

AFRS INFORMATION MANAGEMENT TRAINING CHECKLIST
SQUADRON INFORMATION MANAGEMENT INITIAL TRAINING
(Completed within 60 days of assignment)

One Month Prior to Visit

- ☐ 1. Send letter to squadron CC/RSS/RSSI notifying squadron of training visit (approximate TDY is 4 days).
- ☐ 2. Review squadron FARM records and last IG and SAV reports.

Two Weeks Prior to Visit

- ☐ 3. Contact squadron RSSI for:
 - Billeting reservations have been made and coordinated airport pick-up.
 - Are there any special events that require RCG/RSSI attention, i.e., will need service dress uniform.
- ☐ 4. Ensure the SQ/RSSI is informed of the following items:
 - Training Records. Ensure all training records have the latest CFETP.
 - Emphasize to SQ/RSSI that is training rather than an inspection.
 - Have SQ/RSSI schedule a training visit with the local Flight.
- ☐ 5. Ensure SQ/RSSI has the following materials available for training.
 - All SQ/IMers AF Form 623 (Training Record with current CFETP).
 - IM Continuity Book (if available)
 - Records Management: Latest RIMS version and all associated records.
 - Mail and Postage: Associated Records/Postage Stamp Accountability/Fed Ex
 - Publications and Forms: AF Forms 1382s/AF Form 673s/Form Letter Records
 - Business Cards: Associated Records
 - TDY Orders: Associated Records

- DEP Discharge Orders: Associated Records
- Suspense Management: Computer Software and associated records.
- Flight Secretary Training: Any associated materials. Ensure local flight secretary has been notified of training visit.
- Administrative Training for Recruiters: Associated Records. (See what the flight secretary will have during that visit)
- Inprocessing/Outprocessing: Associated Records.
- If the IM is previously certified as a WM, request a copy of their certification and associated CBT records.
- Current IG Checklist.

One Week Prior to Visit

- ☐ 6. Confirm travel/lodging arrangements with SQ/RSSI.

Office Visit/Start Training

- ☐ 7. Upon arrival at the squadron, in-brief SQ/CC and/or SQ/RSS and outline the training.

Conducting Training

- ☐ 8. Training Records Maintenance and Documentation (all assigned IMs).
 - Current CFETP is in place and the member has completed the AFRS IM QTG prior to RCG IM arrival. If the QTG is complete, sign off the training records as the trainer and recommend the SQ/RSS sign off as the certifier.
 - Review CFETP with the IM. Go over areas they may have concerns about.

Continuity Book (If Available)

- ☐ 9. Go over the continuity book.
 - Go over all the processes and make sure they make sense.
 - Ensure applicable directives are being followed. No deviations.

- If there is not a continuity book, stress the importance to create one. This is the optimum time to do so (right after Group/RSSI training and new on the job).

Records Management



10. Conduct FARM Training. The SQ/RSSI is the sole FARM for the organization. **Complete an AETC Form 67 for the IM after training has been accomplished and if needed conduct a records management SAV on the FARM's program (AETC Form 132).**

- RIMS Review. See if the IM has RIMS experience if not, go over the following:
 - File Plan Maintenance and Creation
 - Office Information Updating
 - Downloading File Plans
 - Uploading File Plans
 - SAV Schedule Reports
 - System Defaults
 - Printing Products (Labels/Plans)
 - Any Other Additional RIMS Training
- FARM Responsibilities. Go over the following subjects:
 - FARM Record Sets Containing the Following:
Signed File Plan Cover Sheet by the COR
AETC Form 67
AETC Form 132 (Completed SAV within last 24months)
 - Staging Records (Only the DEP Discharge Orders are staged)
Go over Group Policy for consolidating and staging these records.
Must be at the Group for staging by 1 Nov of each year.
 - FOIA/Privacy Act
Ensure the FARM understands requests for FOIA/PA must be immediately forwarded to the RCG/RSSI to HQ AFRS.



11. Cover AETC unique records management requirements and go over Records Technician Training.

- AETC Form 67 (Designation of Records Management Personnel)
- AETC Form 132 (Report of Records Management Staff Assistance Visit)

- AETC Form 43 (Request for RIMS Files Maintenance and Disposition Changes/Labels)
- Records Technician Training. See what type of training is provided by the FARM and the flight secretaries.
 - Classroom
 - Hand Outs
 - One on One in Conjunction with SAVs

Mail and Postage Management

☐ 12. Go over postage and mail responsibilities. (NCOIC, Information Management is designated as the Official Mail Manager (OMM) per AETC Sup 1 to DOD 4528 AF Sup.) Other Topics will be discussed:

- Other methods of communicating and shipping material
- Material that cannot be mailed
- Classifications of mail
- Special postal services and discounts
- International mail requirements
- Postage and fees required
- Penalties for private use of official mail
- Performing mail surveys
- Addressing mail
- Cost saving methods

☐ 13. Meter responsibilities.

- Safeguarding
- Readings
- Loading money on the meter

☐ 14. Postage Stamps

- Safeguarding
- Ordering
- Inventories
- Distributing
- Overall RGM Management

☐ 15. Quarterly Report

- Quarterly Air Force Postal Expenditure Report to HQ AFRS/RSIAM.

☐ 16. Federal Express (Express Mail Services)

- Go over Express Mail Service procedures

Publications and Forms Management

☐ 17. Publications Management

- Go over publications management review process and biannual review procedures. Ensure publications sets contain:
 - Draft Copy of Squadron Instruction
 - Original Copy of Squadron Instruction
 - AF Form 673
 - AF Form 1382 (If necessary)

☐ 18. Publications Libraries and semiannual publications and forms listings.

- If the squadron is using the Internet Access/AFEPL for publications libraries the inventories/spot inspections/and listings are not necessary.
- If the squadron still insists on maintaining a hard copy library and they have access to the Internet, stress the importance of getting rid of the paper library.

☐ 19. Form Memorandum Management.

- Ensure the squadron is not developing actual forms. They should not be creating forms unless it meets the criteria as an item to be managed as a form. We will not create forms.
- The RSSI should have an index of form memorandums. Also, these form memorandums should take on the form of a memorandum--not a form.

- Form Memorandums should be numbered i.e., 3XX SQ Form Memorandum 8, Mar 98. This is to ensure proper inventory and accounting.
- Determine the need for form memorandums by utilizing the criteria specified in AFMAN 37-126, Para 5.5.2.

☐ 20. Forms Management (Inventory and Stocking).

- Go over forms stocking. Only a 90-day supply is authorized. Look over procedures to see how it is complied.
- Stress the importance of utilizing the Internet to satisfy most forms needs.

☐ 21. Publications Distribution. ETS (Electronic Transaction System) is now on line. PDOs are closed and organization accounts should be established with the AFPDC.

Printing

☐ 22. The local printing office/DAPS or contract will determine how printing is accomplished. However, go over DODD 5330.3/AF SUP and show what can and can't be printed. Go over AF Form 1112 and AFVA 205-8.

Business Cards

☐ 23. Go over procedures for order business cards. Review the latest letter from HQ AFRS/RSSISI. Make sure the IM has an account to order business cards via the web site. Explain how the web site work and common errors.

TDY Orders

☐ 24. Since the local AFO or DFAS will determine how orders are prepared, focus will only be on disposition and procedures in place for ensuring orders are published support actual mission requirements, are accurate, and published in a timely manner.

DEP Discharge Orders

☐ 25. Ensure proper order formats are used as well as proper records management techniques. These are 56-year records.

Suspenses

☐ 26. Go over the suspense system.

- Tracking and software used.

- Awareness to squadron personnel and updating procedures.

Flight Secretary Training/Administrative Training for Recruiters

- ☐ 27. Visit with the Local Flight Secretary.
 - Go over the SQ/RSSI training plan and associated checklists/materials for flight secretary training.
 - As a minimum does the plan cover:
 - Publications and Forms
 - Operating Instruction Procedures
 - PA/FOIA Request Procedures
 - TDY Orders Processing Procedures
 - Records Management (AFRO Records Management Training)
 - Mail/Postage/Fed Ex Procedures
 - Go over the flight secretaries' plan for training newly assigned recruiters (within 30 days of assignment).

Inprocessing/Outprocessing

- ☐ 28. Go over the use of the AETC Form 1414 (In/Outprocessing Checklist).
 - Use of PCIII in lieu of locator cards.
 - AETC Privacy Act (AETCPAM 37-101).
 - Remind the SQ/RSSI about creating and rescinding Blanket TDY orders, if applicable.

Workgroup Management

- ☐ 29. Make sure the IM is scheduled for AFRS WM Training and has started to meet the CBT requirements per the AFRS IM Training Path. If the IM is previously certified as a WM stress the importance of fulfilling the remaining mandatory requirements on the AFRS IM Training Path as soon as possible.

IG Checklist

- ☐ 30. Go over the current IG checklist. Explain to the IM what the IG is looking for and what they should do to prepare for an inspection.

Concluding The Visit

- ☐ 31. Obtain the IM's signature below and sign as the trainer to certify all actions on this checklist have been reviewed and trained.

TRAINEE SIGNATURE

TRAINER SIGNATURE

- ☐ 32. Out briefed the NCOIC, Information Management (RSSI).
- ☐ 33. Out briefed the SQ/RSS and/or SQ/CC.
- ☐ 34. Completed Trip Report for review thru GP/RSS/CD/CC.
- ☐ 35. Filed Trip Report in appropriate folder.
- ☐ 36. Updated IM Training Records.